

Message Text

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SUBJECT: POLLUTION CONTROL EQUIPMENT TRADE MISSION: THE
BELGIAN MARKET

REF: STATE 260980 OF 11/27/74

1. SUMMARY. NEW PRIVATE CONTRACTOR MARKET STUDY ON POLLUTION CONTROL EQUIPMENT IN BELGIUM IS, IN OUR VIEW, OVERLY OPTIMISTIC ON NEARTERM PROSPECTS. LOCAL CONTACTS AFFIRM THAT BELGIUM STILL HAS FAR TO GO IN CONTROLLING BOTH INDUSTRIAL AND PUBLIC POLLUTION, BUT THAT BUREAUCRATIC AND POLITICAL PROBLEMS WILL CONTINUE TO SLOW PACE OF ITS PROGRAM. THEREFORE, UPCOMING USDOC TRADE MISSION SHOULD BE SUCCESSFUL HERE IF ORIENTED TO MEDIUM AND LONG TERM DEMAND, BUT IMMEDIATE SALES PROSPECTS APPEAR MODEST, AT BEST. END SUMMARY.

2. EMBASSY HAS JUST RECEIVED FROM EMBASSY PARIS ADVANCE COPY OF MARKET RESEARCH STUDY OF POLLUTION CONTROL EQUIPMENT IN BELGIUM PREPARED BY MARKETING PROMOTION SERVICES. WHILE WE HAVE NOT YET HAD A CHANCE TO GO OVER THE STUDY IN DETAIL, OUR INITIAL IMPRESSION IS THAT IT SHOULD BE USED WITH CARE
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IN RECRUITING AND BRIEFING UPCOMING COMMERCE-SPONSORED TRADE

MISSION SCHEDULED FOR APRIL 1975.

3. STUDY IS MOST MISLEADING IN ITS REPEATED ASSERTION THAT THIS MARKET DUE TO EXPAND RAPIDLY HERE WITHIN SHORT TIME. OUR INITIAL CONTRACTS WITH TOP GOVERNMENT AND PRIVATE SOURCES IN THE ANTI POLLUTION FIELD LEAD US TO A VERY DIFFERENT CONCLUSION. THESE SOURCES AGREE THAT GOV IS SLOWLY CREATING A LEGAL AND INSTITUTIONAL FRAMEWORK FOR ACTIVE ANTI-POLLUTION PROGRAM BUT THAT EFFECTIVE IMPLEMENTATION WILL TAKE SOME YEARS. THE FOUR-YEAR OLD GOVERNMENT PLAN TO CENTRALIZE GROUND WATER PURIFICATION (BELGIUM'S CHIEF POLLUTION PROBLEM) IN THREE REGIONAL AUTHORITIES, FOR EXAMPLE, HAS FLOUNDERED SO FAR DUE TO POLITICAL/LINGUISTIC COMPLICATIONS. NO ONE IS YET SURE WHEN OR IN WHAT FORM THESE AUTHORITIES WILL EMERGE; IN THE MEANTIME, ALL INITIATIVE ON WATER PURIFICATION RESTS WITH LOCAL COMMUNES WHICH TEND TO PREFER SPENDING MONEY ON MORE VISIBLE AND POPULAR PROJECTS. CONTRARY TO STUDY'S ASSERTION (PG. 63), PROVINCES DO NOT SET ANTI-POLLUTION STANDARDS.

4. STUDY CLAIMS (PG. 63) THAT CENTRAL GOVERNMENT TO PROMULGATE POLLUTION STANDARDS IN NEXT SIX MONTHS AND THAT PRIVATE INDUSTRY WILL HAVE TO CONFORM BY 1979. IN FACT, MINISTRY OF HEALTH INFORMS US IT IS DRAFTING SPECIFIC STANDARDS (TO COMPLEMENT GENERAL REGULATIONS OF JAN. 23, 1974) BUT THAT ISSUANCE DOUBTFUL BEFORE LATE THIS YEAR OR 1976. THIS WILL MEAN CONSEQUENT SLIPPAGE IN COMPLETION DEADLINE FOR INDUSTRY, PROBABLY INTO EARLY 1980'S. THEREFORE, INDUSTRY UNDERSTANDABLY DOING VERY LITTLE IN ANTI-POLLUTION RIGHT NOW, PARTICULARLY GIVEN GRIM BUSINESS CLIMATE. GOVERNMENT GRADUALLY BUILDING UP SUBSIDY PROGRAMS IN WATER PURIFICATION AND SOLID WASTE REMOVAL - 1974 BUDGET WAS \$50 MILLION AND \$32 MILLION RESPECTIVELY, TO BE RAISED TO \$78 MILLION AND \$39 MILLION IN 1975. ACTUAL DISBURSEMENTS HAVE BEEN SLOW, HOWEVER, DUE TO BUREAUCRATIC AND POLITICAL BOTTLENECKS. AT LEAST PART OF THIS EQUIPMENT MARKET TAKEN BY OVER SIXTY LOCAL ANTI-POLLUTION COMPANIES, INCLUDING SOME U.S. SUBSIDIARIES AND LICENSEES.

5. THIS IS NOT TO SAY THAT FUTURE BELGIAN MARKET FOR POLLUTION CONTROL EQUIPMENT IS INSIGNIFICANT. THERE IS MUCH TO DO; ONLY ABOUT SIX PERCENT OF COUNTRY'S GROUND WATER AND TWENTY PERCENT UNCLASSIFIED

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OF ITS SOLID AND LIQUID WASTE IS TREATED AT PRESENT. GOVERNMENT POLLUTION STANDARDS AND ENFORCEMENT WILL BECOME STIFFER OVER TIME, AND DEMAND FOR VARIOUS KINDS OF CONTROL (BUT NOT MEASURING) EQUIPMENT WILL GROW. OFFICIALS IN BOTH THE MINISTRY OF HEALTH AND PRIVATE INDUSTRY EXPRESS INTEREST IN PROJECTED TRADE MISSION, PARTICULARLY IF COMPANIES REPRESENTED STRONG ON ADVANCED BUT PROVEN METHODOLOGY (E.G. PYROLYTIC WASTE DISPOSAL). IMMEDIATE SALES PROSPECTS APPEAR MODEST AT BEST, HOWEVER; MARKET PENETRATION

EFFORT SHOULD BE AIMED AT MEDIUM TO LONG TERM.

6. WITH THIS ORIENTATION, MISSION STANDS EXCELLENT CHANCE OF SUCCESS IN BELGIUM. IT SHOULD BE NOTED THAT ITS TIMING ROUGHLY COINCIDES WITH BRUSSELS ANTI-POLLUTION TRADE SHOW, JUNE 8-12, AND FRANKFURT TRADE CENTER PROMOTION APRIL 18-21. MISSION COULD ALSO PROVIDE CONVENIENT OPPORTUNITY TO DISCUSS WITH "ANTIPOL" (SUB-GROUP OF MAJOR LOCAL TRADE ASSOCIATION FABRIMETAL) ITS TENTATIVE PLANS TO SEND BUSINESS MISSION TO U. S. IN LATE 1975.
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